



Consultant Checklist

We have developed this checklist as a reference prior to sending procurement packets to PERAC. Please use as a guide to assist you with the documents required for consultants. This checklist can be used for new hires as well as rehires.

1

General Information:

Board - _____
Date Received - _____
Consultant - _____

2

✓ Checklist:

Please ensure you
have all required
documentation listed
to the right prior
to submitting your
procurement package
to PERAC.

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1. Vendor Contact Information Form

2. Retirement Board Procurement Compliance Certification
(Complete in PROSPER)

3. Vendor Certification

4. Vendor Disclosures Form

5. Placement Agent Statement
(Please include all attachments)

6. Retirement Board Evaluation Materials

7. Retirement Board Member Certification
(Complete in PROSPER. One form for each board member)

3

This procurement package is for a (check one)

☐ New Hire

☐ Rehire